



Filing ID #10020720

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Mr. Weldon Frederick Wooden
Status: Congressional Candidate
State/District: MI03

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2018
Filing Date: 05/14/2018

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds 403b ⇒ American Balanced Fund [MF]		\$1 - \$1,000	Tax-Deferred		
American Funds 403b ⇒ American Funds 2020 Retirement fund [MF]		\$100,001 - \$250,000	Tax-Deferred		
American Funds 403b ⇒ Capital World Growth and Income Fund [MF]		\$1 - \$1,000	Tax-Deferred		
American Funds 403b ⇒ Growth Fund of America [MF]		\$1 - \$1,000	Tax-Deferred		
American Water Works Company, Inc. (AWK) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brookfield Infrastructure Partners LP Limited Partnership Units (BIP) [ST]	JT	\$1 - \$1,000	Dividends	\$1 - \$200	\$1 - \$200
checking accounts [BA]	JT	\$15,001 - \$50,000	None		
CSX Corporation (CSX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CSX Corporation (CSX) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
DGW Corp ⇒ DGW Corp, 25% Interest [OL] LOCATION: St. Albans, VT, US DESCRIPTION: royalties paid from natural gas sales		\$500,001 - \$1,000,000	royalties	\$5,001 - \$15,000	\$5,001 - \$15,000
Exelon Corporation (EXC) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Exelon Corporation (EXC) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Exelon Corporation (EXC) [ST] DESCRIPTION: dividends from shares held	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Family Trust ⇒ Family Trust, 25% Interest [MF]		\$500,001 - \$1,000,000	None		
Ford Motor Company (F) [ST]	JT	\$1 - \$1,000	Dividends	None	None
FTI Consulting, Inc. (FCN) [ST]	JT	\$1 - \$1,000	None		
Northwest Insurance [WU]	JT	\$100,001 - \$250,000	None		
Northwest Insurance [WU]	SP	\$100,001 - \$250,000	None		
personal residence w/ rental apartment [RP] LOCATION: Grand Rapids, MI, US DESCRIPTION: Portion of personal residence used as rental apartment	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	\$5,001 - \$15,000
Prudential Retirement Account ⇒ Lord Abbett Mid Cap Stock A [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		
Prudential Retirement Account ⇒ Medley Equity Account [MF]	SP	\$15,001 - \$50,000	Tax-Deferred		
Prudential Retirement Account ⇒ Medley Money Market [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Roth IRA ⇒ Vanguard Target Retirement 2020 [MF]		\$100,001 - \$250,000	Tax-Deferred		
Roth IRA ⇒ Vanguard Target Retirement 2020 Fund [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		
savings account [BA]	JT	\$50,001 - \$100,000	Interest	\$1 - \$200	\$1 - \$200
Tesla, Inc. (TSLA) [ST]	JT	\$1,001 - \$15,000	None		
TIAA Creff ⇒ T Rowe Price Retirement 2020 Fund [MF]		\$250,001 - \$500,000	Tax-Deferred		

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Fountain Street Church COMMENTS: salary paid by church employer	salary as clergyman	\$95,000.00	\$95,000.00
Grand Rapids Public Schools COMMENTS: salary earned for overseeing tutoring program	spouse salary for services rendered	\$20,000.00	\$20,000.00

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Fifth Third Bank	May 2010	mortgage on personal hime	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Board Member	Grand Rapids Urban League
Board member	Opera Grand Rapids

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A ASSET CLASS DETAILS

- American Funds 403b
DESCRIPTION: 403b for Fountain Street Church
- DGW Corp (25% Interest)
LOCATION: St. Albans , VT, US
DESCRIPTION: Newfields Corp. Energy
COMMENTS: royalties from natural gas extraction
- Family Trust (25% Interest)
DESCRIPTION: Invested funds bequeathed by parents.
COMMENTS: assets not managed by beneficiaries
- Prudential Retirement Account (Owner: SP)
DESCRIPTION: Retirement account for Grace Church School
- Roth IRA
DESCRIPTION: Personal IRA for WFW
- Roth IRA (Owner: SP)
DESCRIPTION: Personal IRA for spouse
- TIAA Creff
DESCRIPTION: Retirement for UUA clergy

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

COMMENTS

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Mr. Weldon Frederick Wooden , 05/14/2018